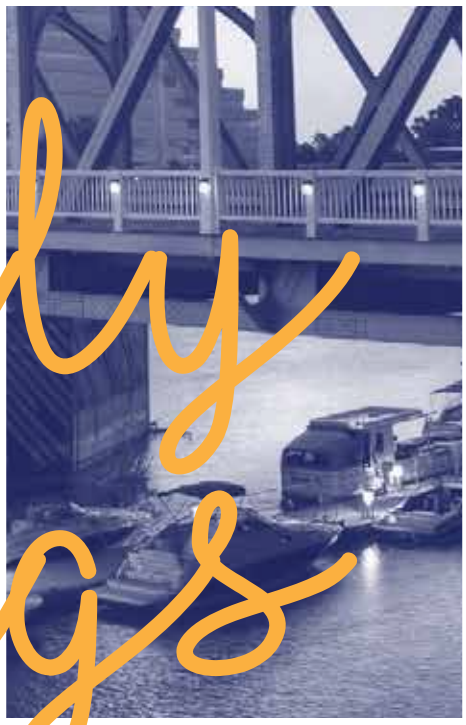
Sacramento
Estate
Planning
Council

2019
2020



monthly meetings

Sacramento Estate Planning Council

University of the Pacific
McGeorge School of Law

save the date!

2020 Estate Planning Forum

McGeorge School of Law . Friday, January 31, 2020 . 8:00 am – 4:00 pm

Wine Reception Following Forum

Presenters

Robert S. Keebler,
CPA/PFS, MST,
AEP (Distinguished), CGMA
Keebler & Associates, LLP

Justin T. Miller,
J.D., LL.M., TEP, AEP®, CFP®
National Wealth Strategist

Keith Schiller, Esquire
Schiller Law Group

The Sacramento Estate Planning Council's Estate Planning Forum is the premier Northern California educational conference for professionals in the estate planning field. The one-day conference features nationally known experts from across the country, speaking on issues and concepts that are essential for practitioners who wish to stay up to date. The Estate Planning Forum, now in its forty-ninth year, is the ideal place to earn continuing education credit in law, accounting and financial planning.

The Estate Planning Forum is one of the few local venues offering 6 hours of credit for general California Bar MCLE purposes and specializations in Taxation Law and Estate Planning, Trust and Probate Law. In addition to credit for MCLE, there will be 6 hours of CE available for CFPs, CPAs and CLPFs.

The 2020 Estate Planning Forum continues the tradition of bringing a diversity of topics to offer something for every practitioner. Please join us and 150+ of your peers for the 2020 Estate Planning Forum.

For more information and sponsorship opportunities for the 2020 Estate Planning Forum, contact Raquel Altavilla at 916-715-5939 or raltavilla@comcast.net.

monthly meetings

ARE HELD AT THE

Sutter Club - California Room

1220 Ninth Street, Sacramento, CA 95814

Cocktails: 5:00 p.m. . Dinner: 5:45 p.m.

September 25, 2019

Glenn Hammel, Ph.D. - Clinical Neuropsychologist, Sacramento, CA

Undue Influence Through the Eyes of the Victimizer

This talk will explore how artful manipulators choose their victims and use their role and power to exploit their trust, dependency, and fears. This is not going to take place within the typical lecture format, and the attendees will not merely be taught facts and descriptive statements. Rather, this session will offer an experiential approach, during which each participant will also be encouraged to understand the dynamics of undue influence by learning how to think like a victimizer. In addition, we will discuss the practical and interpersonal skills needed for responding to the victims of undue influence.

October 23, 2019

William Finestone, Partner - Blank Rome LLP, Los Angeles, CA

Charitable Pledges with Carol Bradford

Few topics are more important and less understood than pledges by donors to make future contributions to charity. The question of whether a pledge is an enforceable obligation depends upon state law, and can have many important consequences. The donee charity will be concerned largely about whether the donor will in fact satisfy the promised gift. The donor will have more complex issues, including income, gift, and estate tax questions. The speakers will review all of these issues and provide a state-by-state summary of the law relating to enforceability of pledges. Sample pledge agreements will be provided for discussion. You will gain an increased knowledge of the legal implications of charitable pledges.

November 20, 2019

Jeffrey T. Makoff, Litigation & Mediation Partner - Valle Makoff LLP, San Francisco, CA

Welcome to the Post-Marriage World: How to Advise a Generation that Says "I Don't"

We are approaching an era – possibly permanent – in which most people will not get married, ever. The "married by 32" rate for millennials is 26% (down from 36% for GenX, 50% for Baby Boomers and 65% for the Silent Generation). Nearly half of Americans agree that "marriage is becoming obsolete." Yet couples continue to move-in together, make increasingly complex financial deals and decisions, purchase and improve property, form and grow businesses and have children. What has changed for individuals and their advisors are the life events that signal a need for planning – traditionally engagement, marriage, in-law joining the business, marital separation, divorce, and death of a spouse. There are important new action points, different sets of laws, and powerful legal and financial approaches to establish or clarify a couple's rights, obligations and intentions. In this presentation, a San Francisco attorney who advises prominent entrepreneur couples (married and unmarried) on their legal and financial relationships will survey the timing, terminology and laws that govern couple-centric financial and business succession planning in the post-marriage era.

monthly meetings

The Sacramento Estate Planning Council ("SEPC") provides a forum where Trust Officers, Private Fiduciaries, Attorneys, Certified Public Accountants, Chartered Life Underwriters, Chartered Financial Consultants, Certified Financial Planners, Chartered Financial Analysts, Educators, Planned Giving Professionals, and Accredited Valuation Experts in the Sacramento Valley can meet and share information about new developments in estate planning, a constantly changing field.

Members continue their professional development at monthly dinner meetings that feature speakers on important topics related to estate planning.

The SEPC is a non-profit, professional association which serves as an educational and networking resource for over 200 regional members who practice in the area of estate planning. If you are an Estate Planning professional practicing in the Sacramento area, we encourage you to learn more about our organization and attend our events.

February 26, 2020

Patrick Fearon-Hernandez - Confluence Investment Management LLC, St. Louis, MO

Investing: Outlook for 2020

TBD

March 25, 2020

Scott MacDonald, Managing Director, THE SPECIAL NEEDS TEAM - Merrill Lynch, Pierce, Fenner & Smith, Inc., Modesto, CA

Fiduciary Horror Stories Panel - Case Studies of Fiduciary Horror Stories

The presentation will focus on very advanced issues related to problem cases from the Fiduciary, Financial and Legal perspectives. Our expert panel, bruised and scarred, will gather to tell tales of dismay from their vast years of experience.

The format for the event will be an interactive discussion with audience participation to seek possible solutions and understand relevant preventive measures. Come join us to learn how to keep your clients from transmuting into the dreaded Zombie Client!

April 22, 2020

David D. Little, Senior Associate - Hartog, Baer & Hand, Orinda, CA

Effective Handling of Creditor's Claims in Trusts & Estates

Did you know that not all claims against a decedent are barred by the one-year statute of limitations? How should you approach the creditor's claim procedure with illiquid estates or trusts? What happens when creditor files suit on a rejected claim? David D. Little, Senior Attorney with Hartog, Baer & Hand, APC in Orinda, California will answer these and other questions in Trust and Estate administrations. David will discuss the strategic approach to the timing of notice to creditors, how to evaluate claims, resolution of disputes regarding claims, and what happens when there is a suit on a rejected claim.